

0. Intro

The files in this package are captures of a sample database for Microsoft Dynamics CRM version 4.0. They are to be used with that version mainly the English language version. I've backed them up so it's easier for me to restore my own environment but also easier for others who would like a sample to get them up and running.

IMPORTANT: For this procedure to work as it is intended, you'll need to be working on CRM version 4.0 Enterprise Edition as it is the only edition of CRM that supports multiple organizations on the same CRM server. If you're on professional or workgroup, I encourage you to stand up a separate AD environment that you can deploy this on, or get the sample files from the internet archive page all about CRM.

1. What's included?

This package contains the following sample Microsoft SQL Server 2005 Databases. Note that all five of these are not required to get a demo up and running, but are iterative versions of the same thing. The one called "0_..." is an absolutely blank slate, the one called "4_..." is a fully customized and set up system using the iCARE customization set.

IMPORTANT: It is highly recommended to choose one version and stick with it as the versions that contain sample data will need to have the users that are a part of that sample data "mapped" to users in your company's Active Directory.

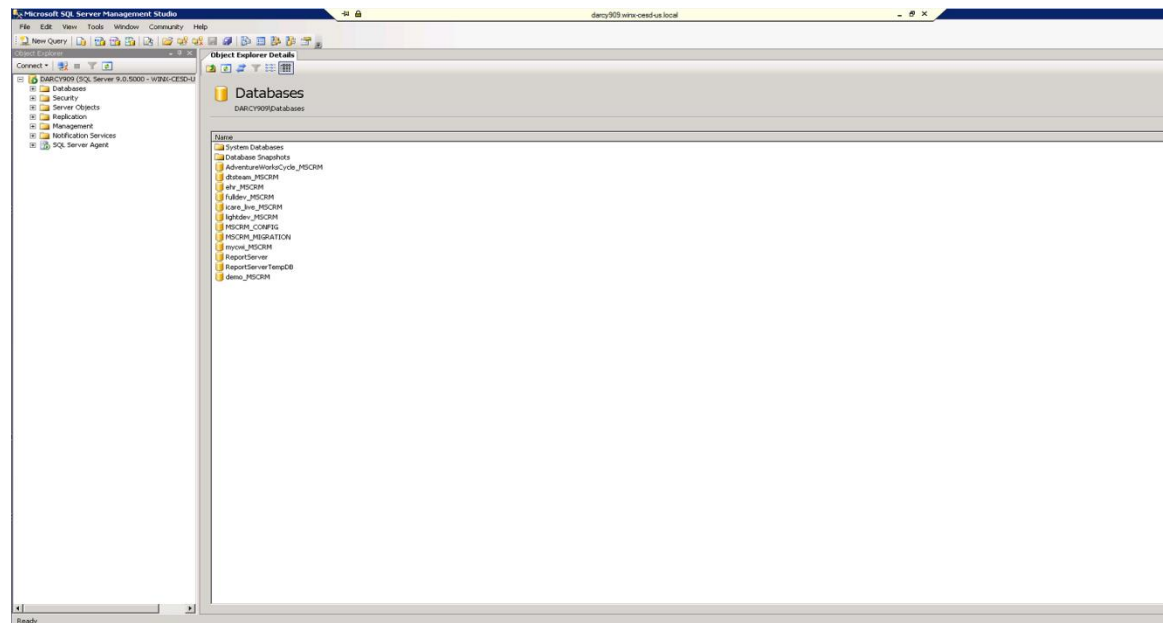
- **0 Demo Full NoChange.bak**: This is a completely blank database with nothing (not even the sample data) thus if you want to start from absolute scratch you can.
- **1 Demo DataImported NoCustomize.bak**: This is a copy of the same database but it has all of Microsoft's sample data installed.
- **2 Demo Full-Import Add-iCARE.bak**: This is the same as above but has the latest iCARE (version 14) customizations already applied so you can see what my job uses.
- **3 Demo Full Import Add iCARE Christie Sample.bak**: This is an iCARE database with one customer (card) added called "Christie Sample" that shows all the iCARE-Specific customizations in action.
- **4 Demo Full Import Add iCARE Christie Sample Add Alerts.bak**: This database is the same as the one above just adding several announcements (mainly a note about taking screen shots of the sample data, a note about the database resetting every 24 hours (something I'll have to

cover in another article), and an example of an office note indicating that masks are required in office (once the COVID-19 pandemic is over... that note's really going to show its age))

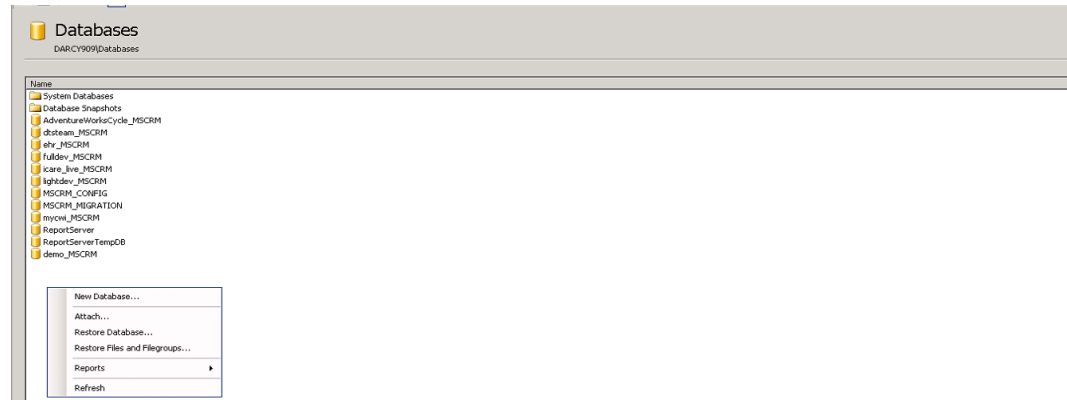
2. Installing the Samples

To install the samples take the following steps:

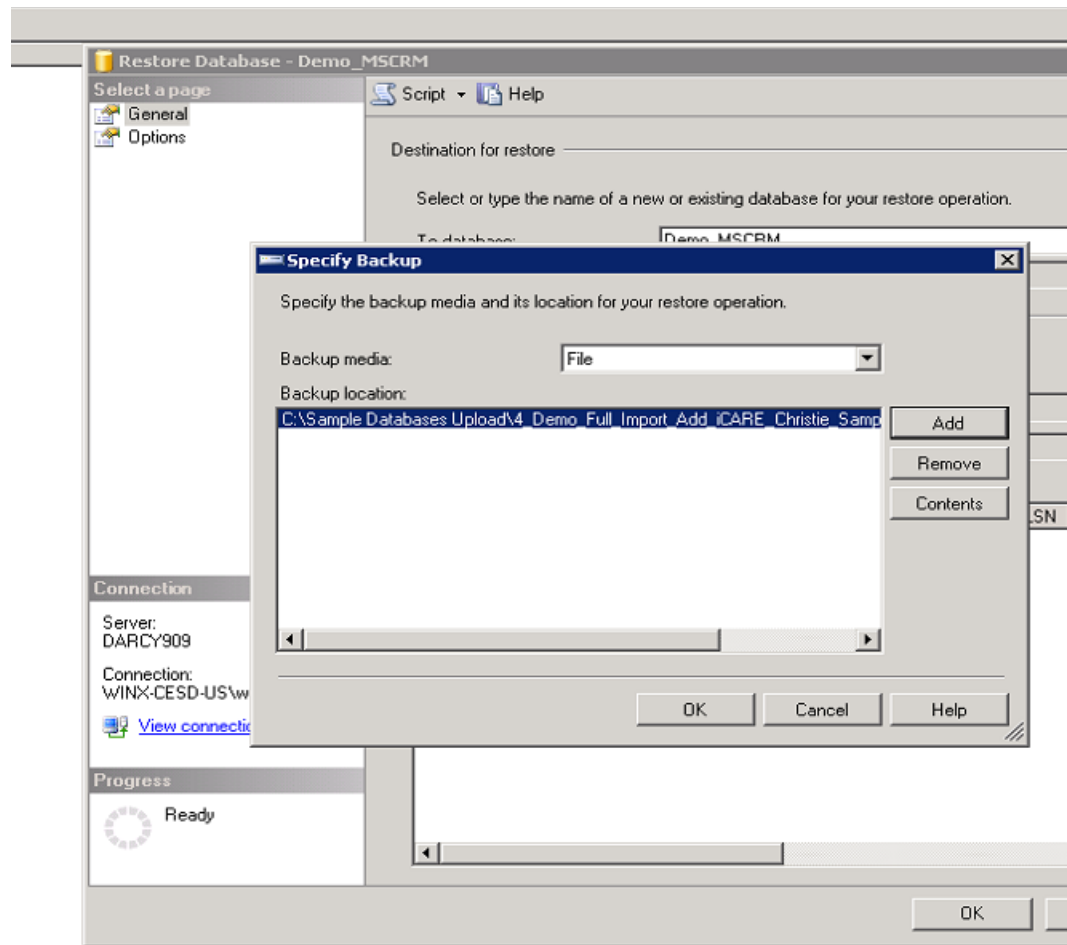
0. Make sure you have Microsoft Dynamics CRM version 4.0 installed and rolled up to Update Rollup 21.
1. Create appropriate users in AD to match the sample users as listed in section 5 (it is recommended to put them in their own separate OU from your production users so they don't get confused)
2. At the SQL Server, unpack the files in this archive and decide which one you want to deploy as you can only have one version of CRM with the name "AdventureWorksCycle" (the name of the sample company). Or if you want to play with them all, just create multiple organizations that restore to a different database.
3. Open SQL Server Management Studio and navigate to databases.



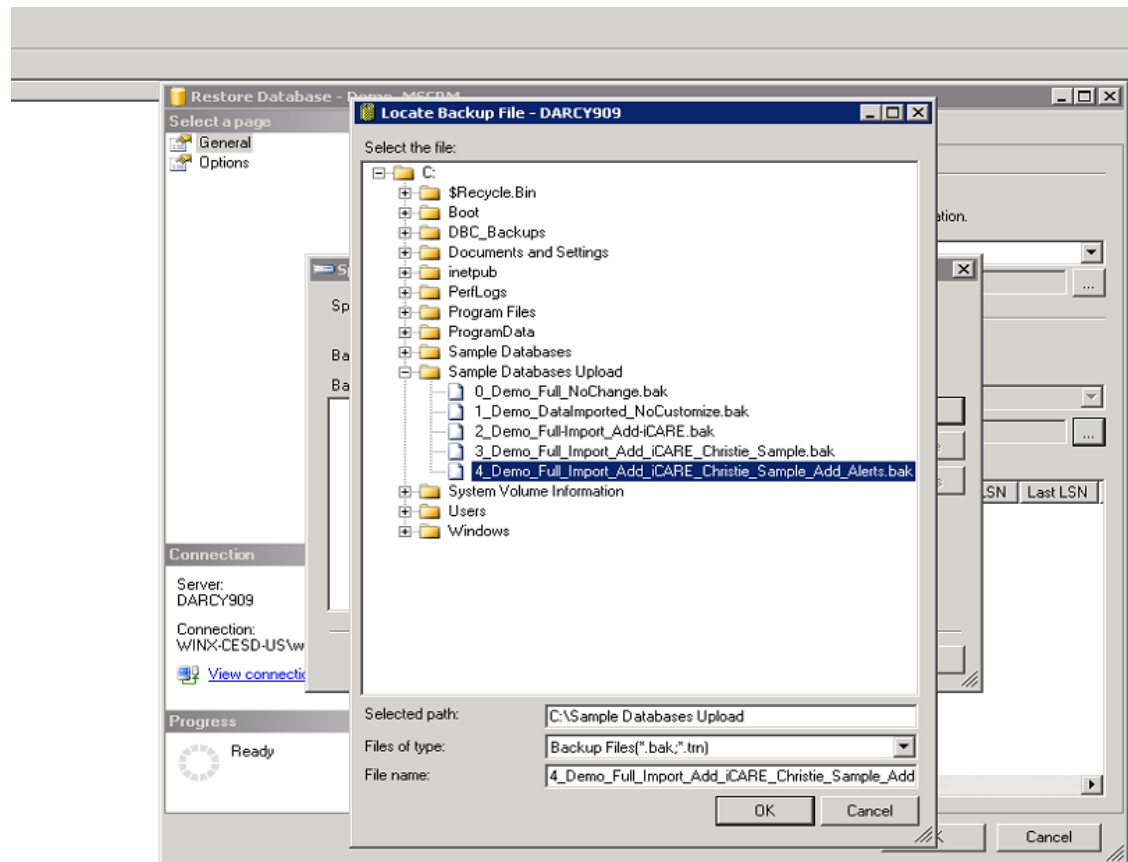
4. Right click Databases and choose “Restore Database...”



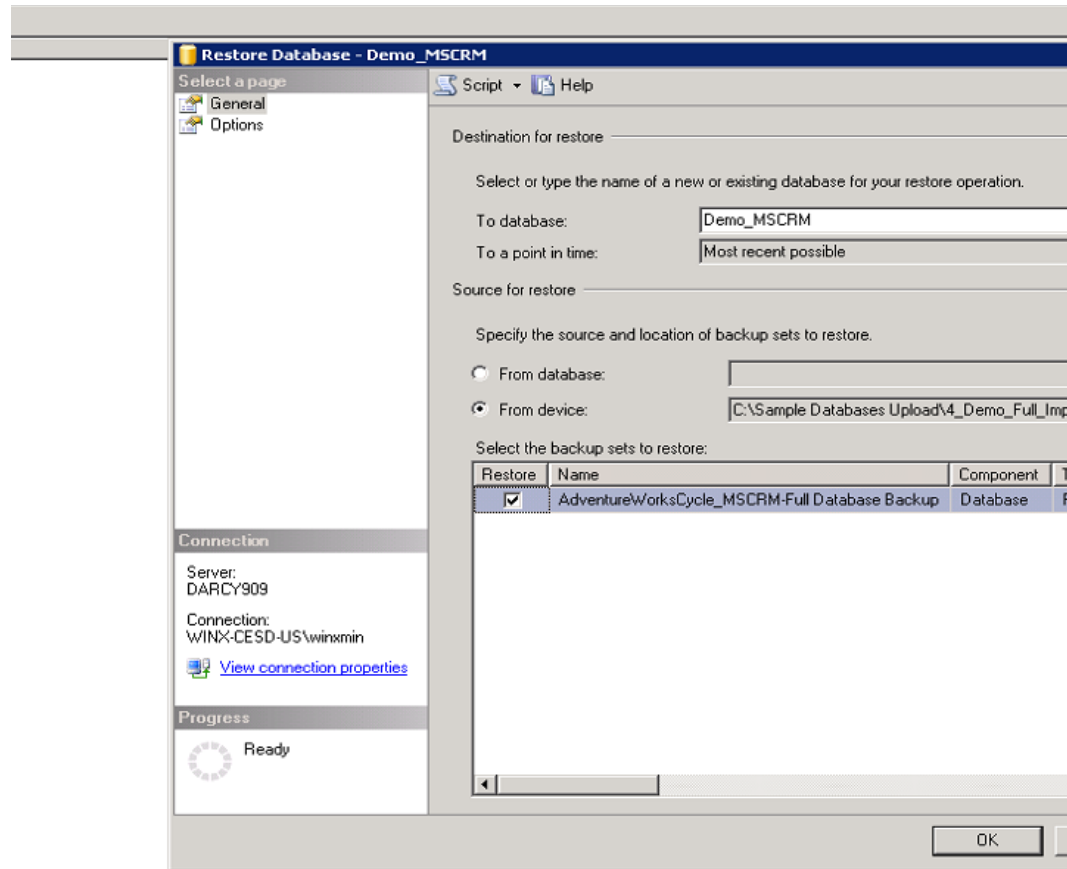
5. In the window that appears, do the following:
 - a. In the To Database field under the “Destination for Restore” section, type “Demo_MSCRM”.
 - b. In the “Source for Restore” group choose “From Device” then choose the ellipsis (...) button next to the “From Device” option.
 - c. In the “Specify Backup” dialog box, ensure that “File” is selected in the dropdown box and choose the “Add” button



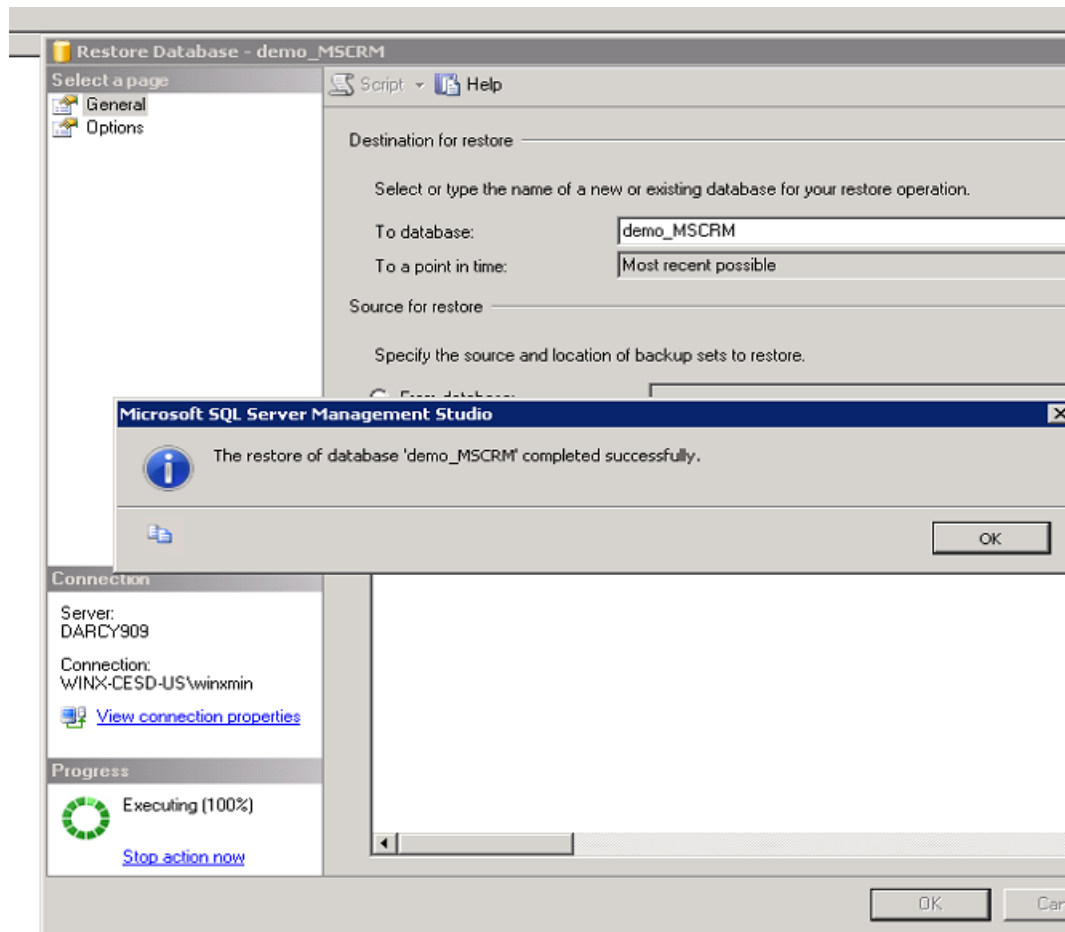
- d. Browse for the *.bak you want to restore then click OK



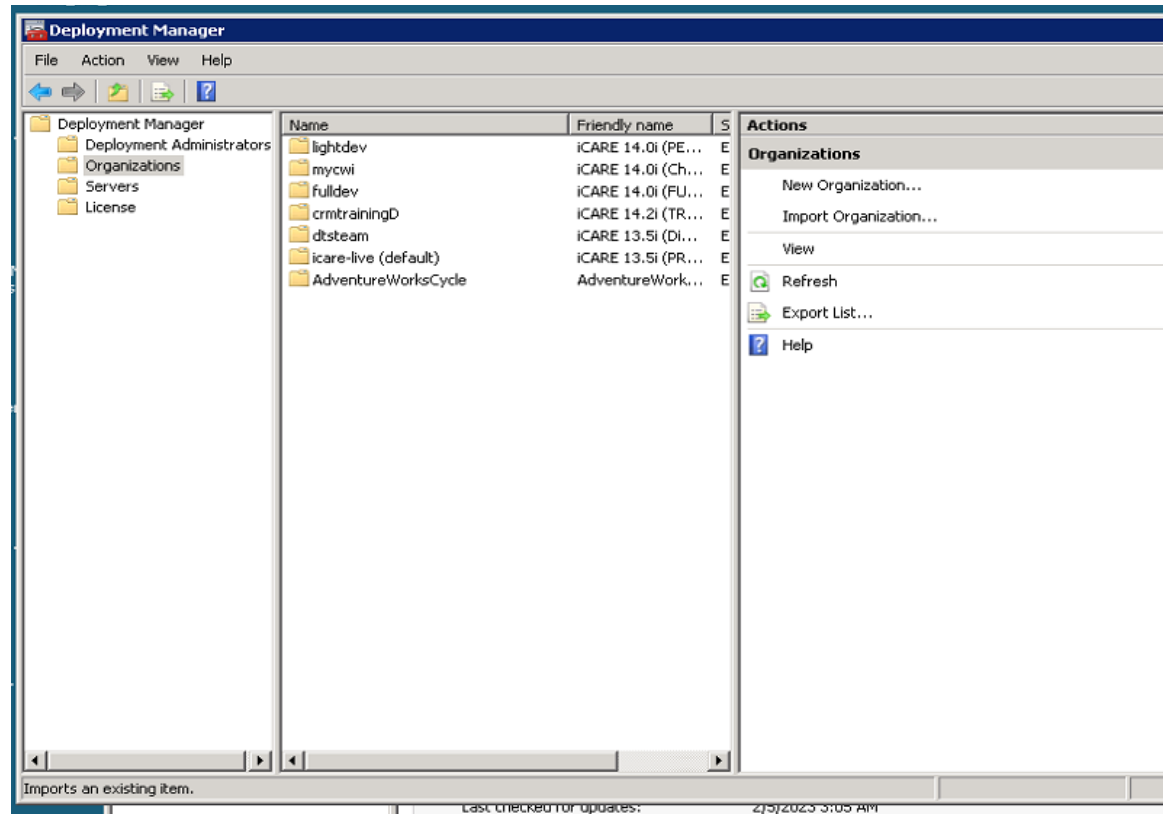
- e. At the Specify backup dialog, choose OK
- f. At the "Restore Database" dialog box under the "Select Backup Sets to Restore" section, check the only check box present then click OK



- g. If all goes well, you should get a success message. If that is the case, click OK, otherwise, troubleshoot any error messages that might come up.

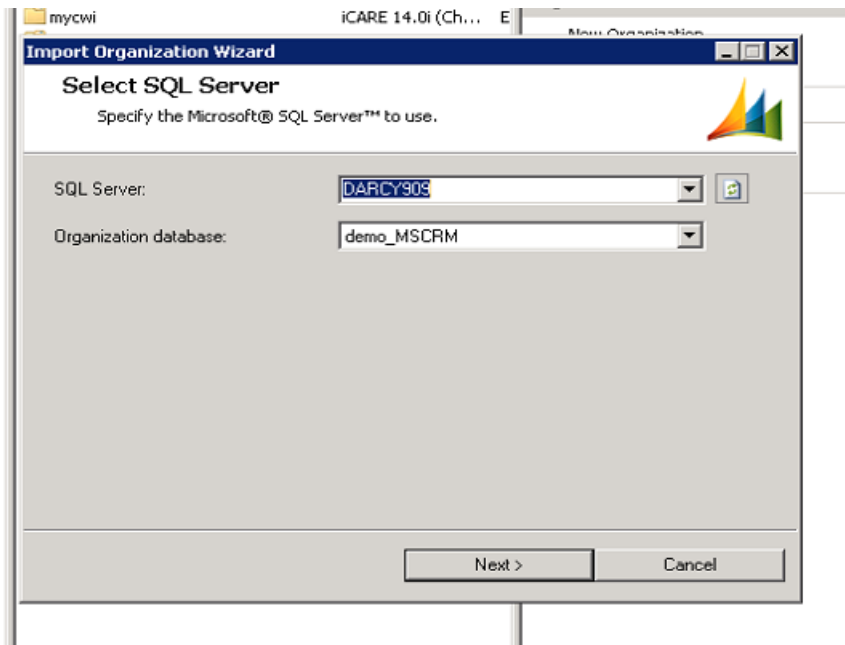


- h. Once the database is successfully restored, close SQL Server Management Studio
6. At the Microsoft Dynamics CRM Server, take the following steps to import the sample data
 - a. Open CRM Deployment Manager and navigate to “Organizations”



- b. Choose "Import Organization" from the right hand tasks pane
- c. In the Import Organization Wizard, take the following actions:
 - i. On the SQL Server page, specify the SQL Server and Organization Database

(note, you might need to hit the little refresh icon next to SQL Server to get it to find the SQL Server in the network.) If you don't see your "Demo_MSCRM" Database, check at the SQL server that it is named with the "_MSCRM" suffix.



- ii. On the Specify Organization Name page, specify the Display Name and press tab. If the Name looks acceptable, click next; otherwise, modify it. The display name is what displays under the About box, in the upper right of the CRM web interface under the person's name and the name is the part of the URL that is used to access the CRM. (example: if I set Display Name to "iCARE Demo Version" the system automatically fills in "Name" to "icaredemoversion" so if you put a descriptive name like "iCARE 14.2i (Demonstration Environment)" that you shorten it to something like "crmtraining" or similar for ease of access. VERY IMPORTANT: make sure you spell both the name and display name fields exactly as you want them (or even have a colleague check) because once the database is imported, you cannot go back and change them without a bit of monkeying around in the SQL config database which is not a recommended practice by Microsoft. And as we can see... I really should have followed my own advice of getting a colleague to look over this for me.

Import Organization Wizard

Specify the Organization Name

Specify the name of your organization for this installation of Microsoft Dynamics CRM Server.

Display name:
iCARE 14.2i (TRAINING ENVIRONMENT)

Name:
cmtrainingD

< Back Next > Cancel

- iii. On the Specify Reporting Server page, specify the web address of the Report Server (example: <http://darcy909/ReportServer>) and NOT the Report Manager

Import Organization Wizard

Specify Reporting Services Server

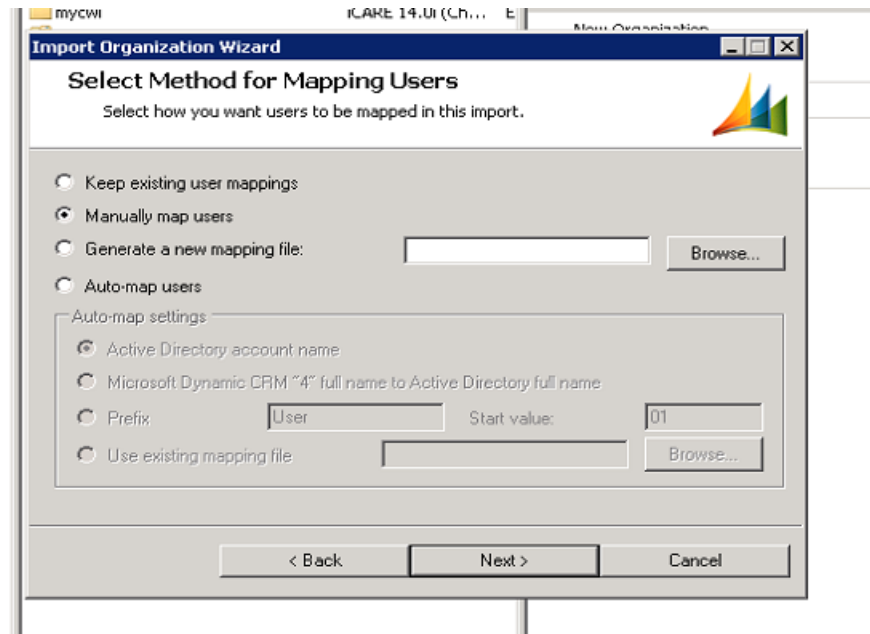
Specify an existing SQL Server Reporting Services Report Server URL.

Report Server URL:
<http://darcy909/ReportServer>

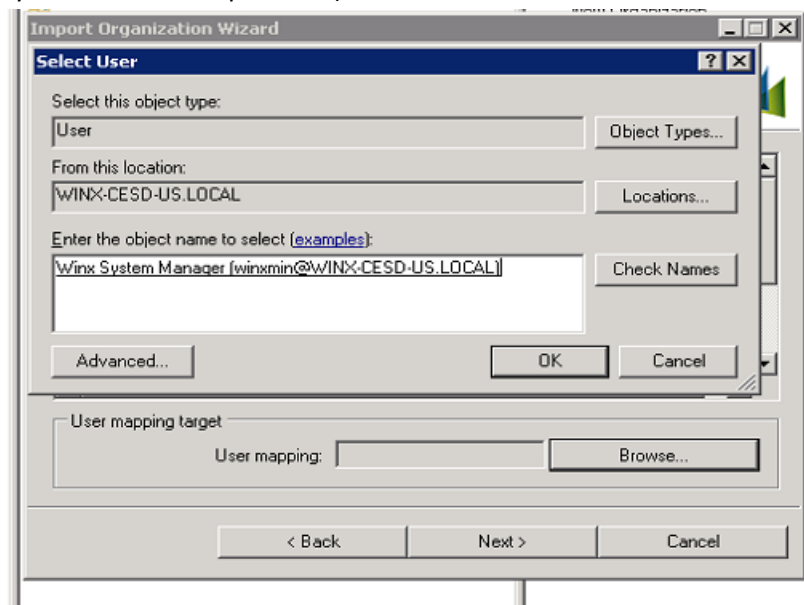
Make sure to specify the Report Server URL and not the Report Manager URL.
Example: <http://Host/ReportServer>.

< Back Next > Cancel

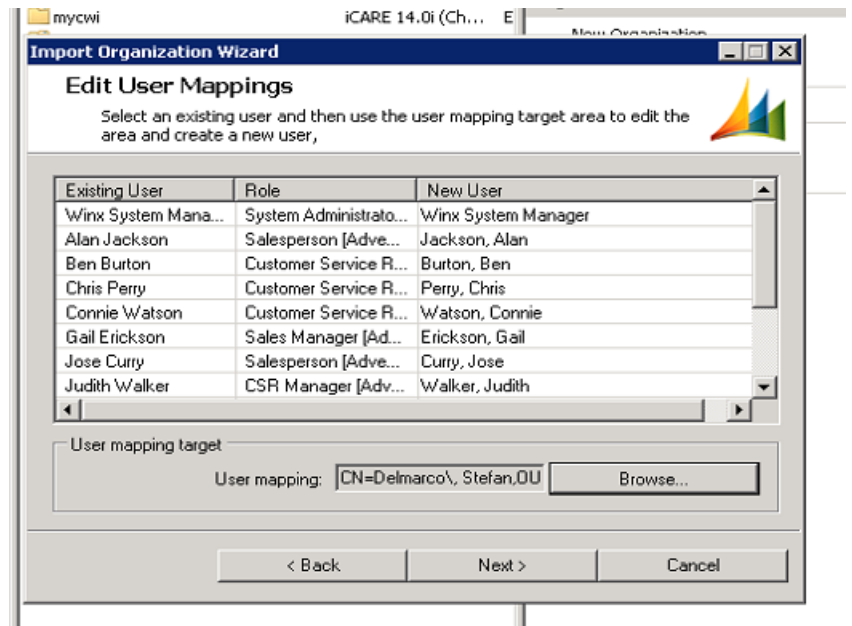
- iv. On the Select Method for Mapping Users page, choose the “Manually Map Users” option



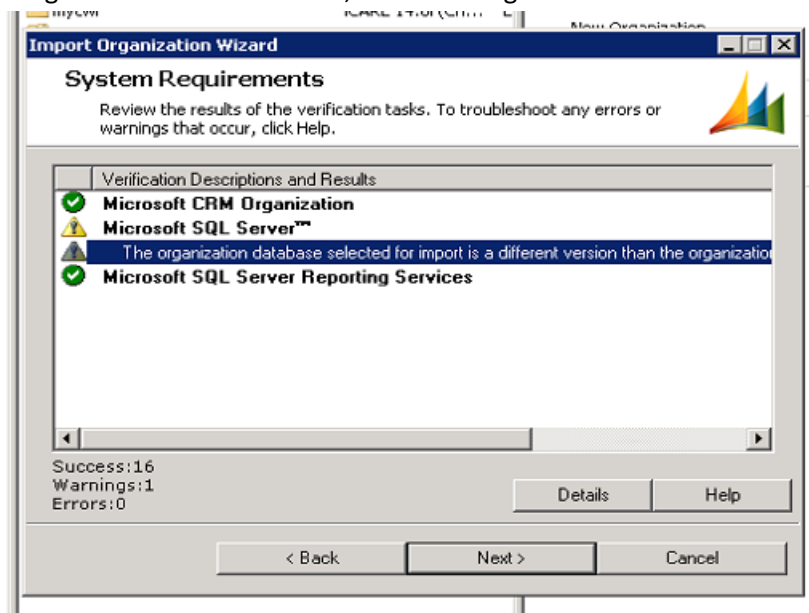
- v. On the Edit User Mappings page, select each user and choose Browse to specify which AD user maps to the selected user (this is the reason I instructed you to create sample users)



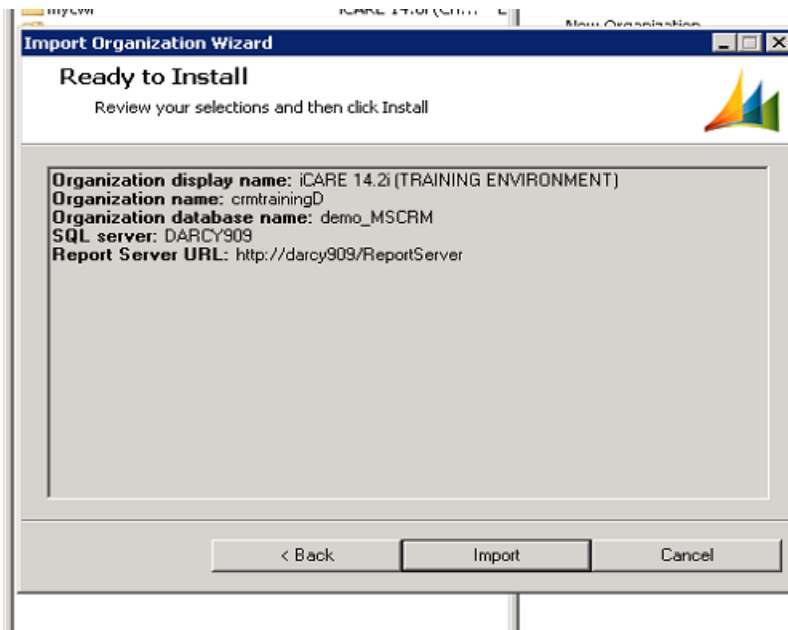
1. As you successfully map each user the name will show up in the table.



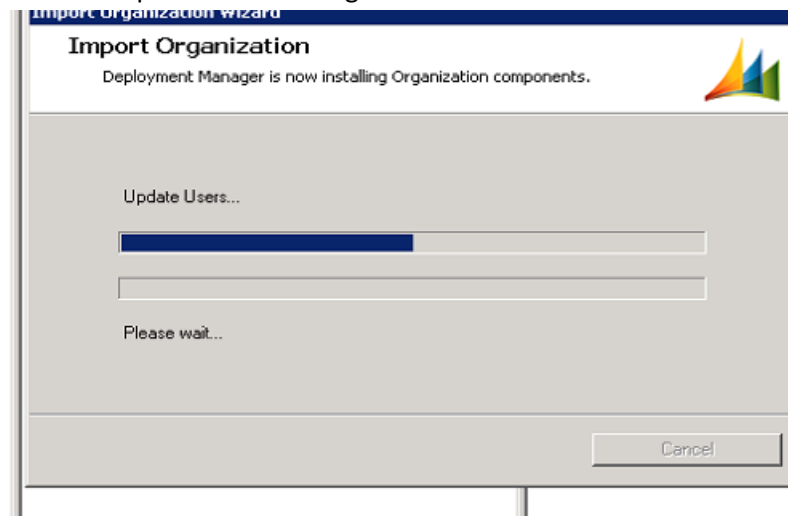
- vi. On the System Requirements page, check that you have all green check marks and no red X's. If you see a yellow warning triangle next to SQL server complaining about database version, feel free to ignore it.



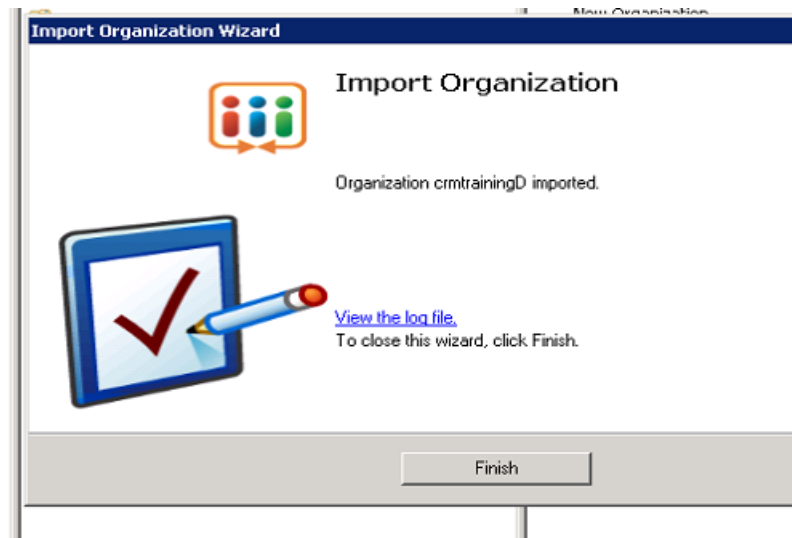
- vii. At the Ready to Install screen review everything to make sure it all looks good. If all is well, click on "Import" if you want to make any changes, this is your last chance to do it. Again... I REALLY should've taken my own advice here as in the "Organization Name" entry there's a spelling error (notice the capital D that really shouldn't be there...)



viii. Wait for the import to do its thing.



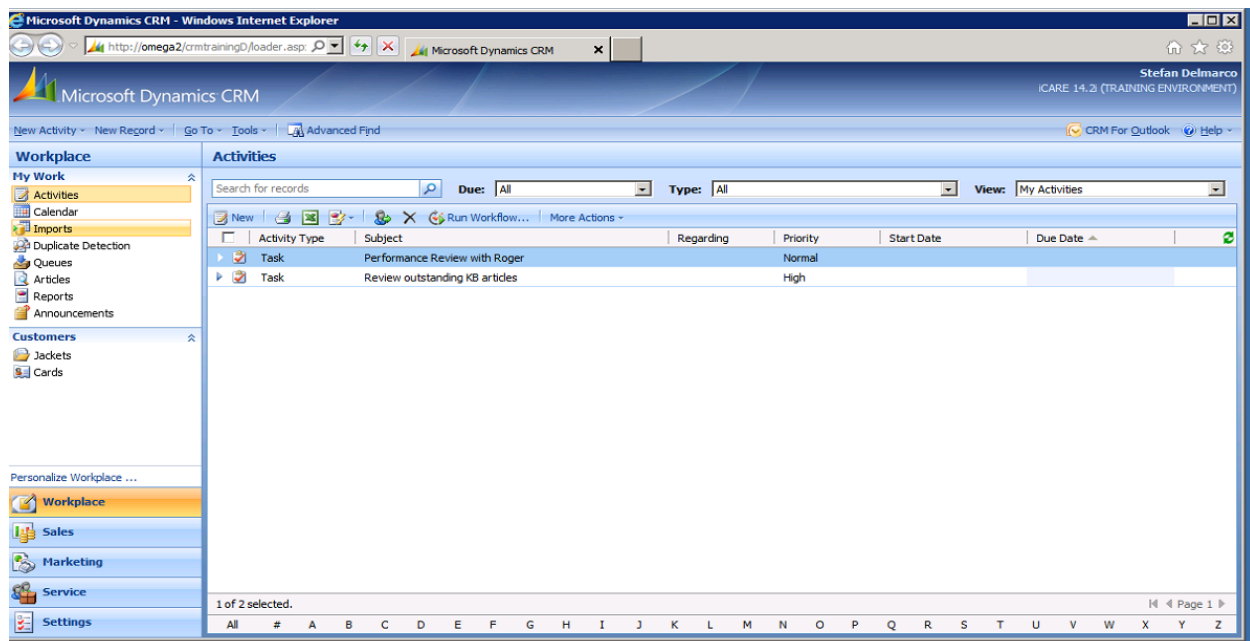
ix. On the “Import Organization” screen (hopefully) you see that your organization was imported successfully. And here’s where I finally notice my spelling error from the 2nd screen; again, please don’t do what I did and actually check your spelling.



7. At the SQL Server open up SQL Server Management Studio and TAKE A BACKUP of the newly imported database that way you have a fully mapped and set up database to restore back to that is specific to your environment. REMEMBER: we called it demo_MSCRM.

3. Using the Samples

Now that you have the sample data imported, log on to your network as one of the demo users and launch IE and go to <http://server/org> where server is your organization's CRM server and org is the name of the organization (example: cmtraining). This is where I encourage you to set up an IFD for all your organizations so you can sign in using a form rather than the constant login/logout shuffle of certain demonstrations.

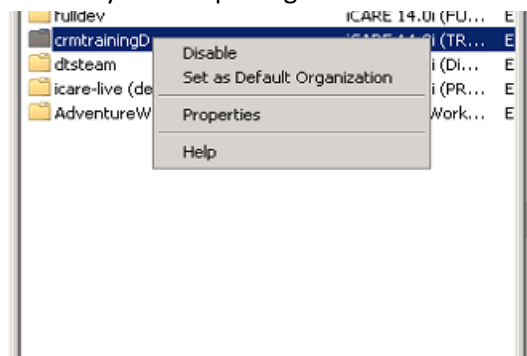


4. Removing the Sample Database:

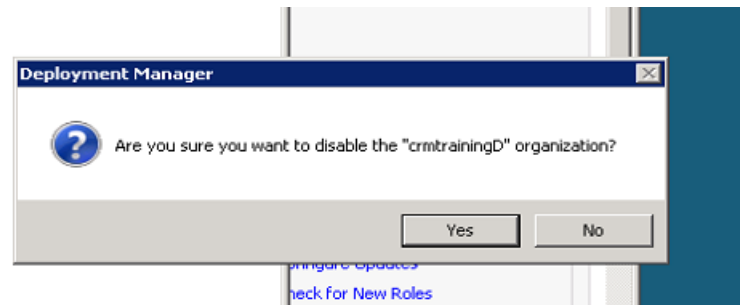
Once you're done with the demo data, you can either leave the instance in place or you can remove it to save space.

To completely remove the demo data, take the following steps:

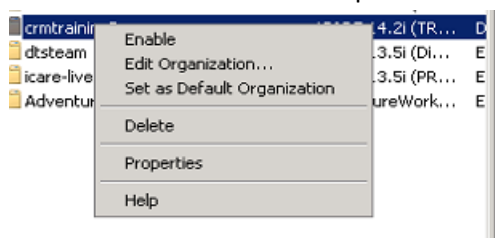
1. At the CRM server open deployment manager and navigate to Organizations
 - a. Right-click on your sample organization and choose Disable



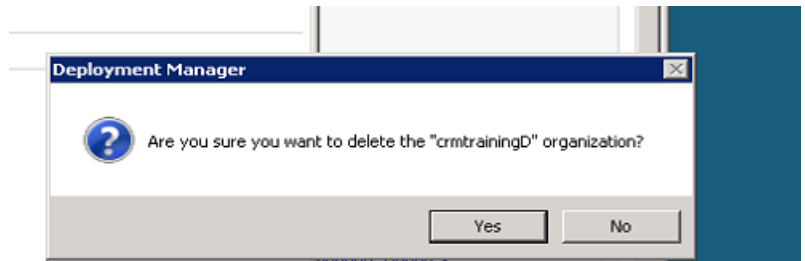
- b. Answer Yes to the dialog box



- c. Right click on your sample organization and choose delete
WATCH OUT! Choosing the wrong organization here will possibly delete your real-world (production) org and you'll need to restore it from an import.



d. Answer Yes



2. At the SQL Server, take the following actions
 - a. Launch SQL Server Management Studio and navigate to Databases
 - b. Right-click on demo_MSCRM (or if you named it differently, whatever your name is) WATCH OUT: deleting the wrong database here could cause you to lose real-world (production) data and you'll need to restore from backup.
3. At a Domain Controller, delete all the sample users. WATCH OUT: You want to make sure you're deleting the sample users and NOT any of your real-world users, groups, OUs, etc. Doing so will not be a good day for your IT folks.

5. List of Sample Database Users to Create in AD

Find below a list of sample database users that will need to be created in your company's Active Directory (AD) system:

Name	Alias	Microsoft Dynamics CRM Security Role	Job Title
Alan Jackson	alan	Salesperson	Eastern Region Channel Sales Representative
Ben Burton	ben	Customer Service Representative	Eastern Region Bike Service

			Technician
Chris Perry	chris	Customer Service Representative	Central Region Bike Service Technician
Connie Watson	connie	Customer Service Representative	Customer Service Representative
Gail Erickson	gail	Sales Manager	Western Region Channel Sales Manager
Jose Curry	jose	Salesperson	Central Region Channel Sales Representative
Judith Walker	judith	CSR Manager	Western Region Bike Service Manager
Mathew Pereira	mathew	Customer Service Representative	Western Region Bike Service Technician
Patricia San Juan	patricia	Marketing Manager	Retail Marketing Manager
Roger Van Houten	roger	Customer Service Representative	Customer Service Representative
Ryan Williams	ryan	Customer Service Representative	Customer Service Representative
Stefan Delmarco	stefan	CSR Manager	Customer Support Manager